

Navigation Tips in Cardinal Financials Overview

This Job Aid provides overview information pertaining to some general navigation tips in Cardinal Financials (FIN) and some of the common buttons and links users will encounter in Cardinal Financials. In addition, the following functional processes are detailed in this Job Aid with step-by-step instructions:

- Navigating to specific pages
- Adding a Favorite
- Managing and Deleting Favorites

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

Table of Contents

Revision History	2
System and Data Entry Features Overview.....	3
Navigating to Cardinal Financial Pages using the Menu.....	8
Adding a Favorite.....	14
Managing and Deleting Favorites.....	18
Common Buttons Overview	23
Hot Key (Keyboard Shortcuts).....	24



Revision History

Revision Date	Summary of Changes
9/30/2025	Updated the system timeout information from 30 minutes to 15 minutes of inactivity per VITA compliance.
1/16/2025	Baseline.

System and Data Entry Features Overview

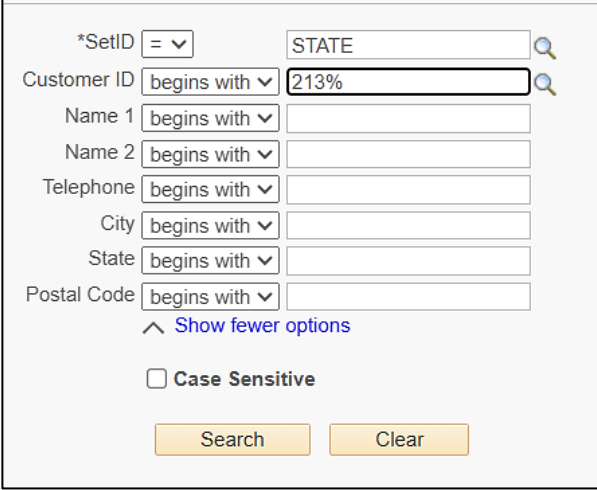




This section provides an overview of the some of the common system and data entry features available within Cardinal Financials (FIN).

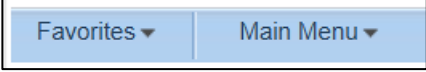
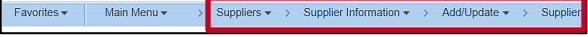
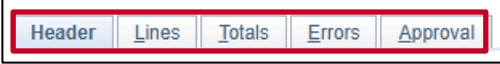

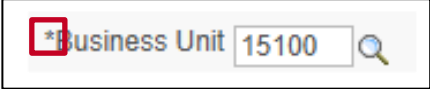
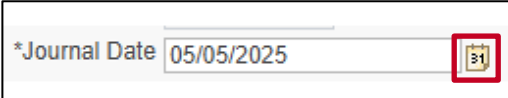
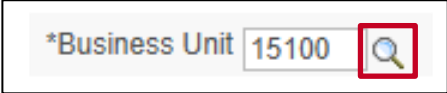
System Feature:

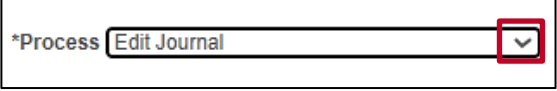
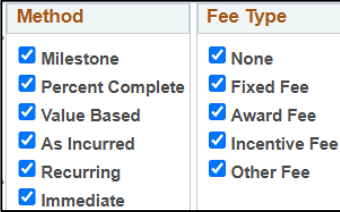
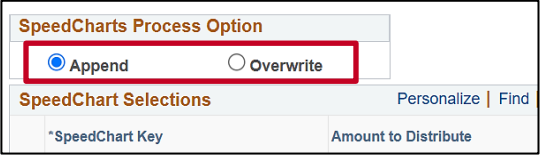
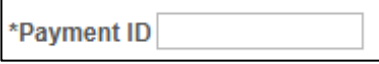



Feature	Description
System Timeouts	<p>For security purposes, Cardinal times out (terminates) any session that is inactive for 15 minutes. If timed out, any unsaved work will be lost. Therefore, it is recommended to save work as often as possible.</p> <p>A Warning message will display indicating that the session is about to time out 2 minutes prior (13 minutes of inactivity).</p> <p>Note: If multiple Cardinal windows are open, the user will be timed out of all windows.</p>




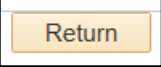

Data Entry Features:

Feature	Description
Advanced Search	<p>When performing advanced searches, the following search operators are available for use which will help define and narrow the search results:</p> <ul style="list-style-type: none"> • Begins With • Contains • = (equal to) • Not = (not equal to) • < (less than) • <= (less than or equal to) • > (greater than) • >= (greater than or equal to) • Between • In <p>Note: The search operators available for selection will vary based on the actual search criteria field (value).</p> <p>Additional search information can be found in the Job Aid titled Overview of the Cardinal FIN Search Pages, located on the Cardinal Website in Job Aids under Learning.</p>

Feature	Description
<p>Wildcard Symbols (%)</p> 	<p>Cardinal uses the % (percent) symbol as a wildcard. When performing searches, wildcard symbols are used to denote one or more unknown characters in a data value.</p> <p>Using Customer ID “21300” as an example:</p> <ul style="list-style-type: none"> • If the first few digits of the Customer ID are known, select the “Begins With” search operator and enter “213%” in the Customer ID search field • If specific digits within the Customer ID but not the entire Customer ID is known, select the “Contains” search operator and enter “%130%” in the Customer ID search field • If the last few digits of the Customer ID are known, select the “Contains” search operator and enter “%300” in the Customer ID search field
<p>Home link and Home button</p> 	<p>Clicking the Home link or Home button returns the user to the Cardinal Financials Homepage.</p>
<p>Refresh Menu link</p> 	<p>Clicking the Refresh Menu link refreshes the Cardinal Financials Homepage.</p>
<p>Pagelet Settings dropdown</p> 	<p>Clicking the Pagelet Settings dropdown allows the user to remove a pagelet from their homepage or minimize the pagelet. Pagelets can be added back from the “Personalize Home Page Content” page.</p>
<p>Help link</p> 	<p>Click the Help link located on the upper right side of the page takes the user to the Cardinal Website Homepage.</p>

Feature	Description
	<p>The blue banner at the top of the Cardinal FIN Homepage that houses the menu is called the NavBar. The NavBar is the primary navigation tool, allowing users to access various components such as Favorites and the Main menu. As users navigate using this menu, additional links will appear in the NavBar. These are often referred to as “Bread Crumbs”.</p> 
<p>Tabs</p> 	<p>Some Cardinal Financials transaction pages contain multiple tabs (pages) of information available for review or data entry. When applicable, click the tab to display the corresponding page.</p>
<p>Links</p> 	<p>Some Cardinal Financials transaction pages contain multiple pages of information available for review or data entry. When applicable, click the link provided to display the corresponding page.</p>
<p>Required fields</p> 	<p>Required fields in Cardinal Financials are marked with an asterisk.</p>
<p>Calendar icons</p> 	<p>Date fields in Cardinal FIN have a Calendar icon that should be used to select the applicable date. This eliminates the need for manual data entry and minimizes the chance for data entry errors.</p>
<p>Look Up icons</p> 	<p>Some data fields in Cardinal Financials have a predefined list of acceptable values associated with the field. Use of these predefined lists eliminates the need for manual data entry and minimizes the chance for data entry errors.</p> <p>Look Up icons are typically used when the predefined list of values is long, and they normally also include an ability to perform a search within the pre-defined list. Once the user locates the applicable data value, simply click the corresponding link to populate the field.</p>

Feature	Description
<p>Dropdown buttons</p> 	<p>Some data fields in Cardinal Financials have a predefined list of acceptable values associated with the field. Use of these predefined lists eliminates the need for manual data entry and minimizes the chance for data entry errors.</p> <p>Dropdown buttons are typically provided when there is a relatively short list of pre-defined values. Simply select the applicable value by clicking on the corresponding list item to complete the field.</p>
<p>Checkbox select options</p> 	<p>Checkbox select options are used when the user is able to make one or more selections.</p>
<p>Radio Button select options</p> 	<p>Radio Button select options are used when the user is limited to making only one selection. When multiple options can be selected, Cardinal Financials uses Checkbox select options.</p>
<p>Free Form Data Entry Fields</p> 	<p>Some fields in Cardinal Financials are free form data entry fields. In these fields, simply type the applicable data to populate the field.</p>
<p>Sign Out link</p> 	<p>Click the Sign out link to log out of Cardinal. Do not use the Close (X) icon in the top right corner of the browser window or the Close (X) icon of the browser tab to log out of Cardinal.</p>
<p>Sort icon</p> 	<p>The Sort icon allows users to sort menu list items alphabetically in ascending or descending order.</p>
<p>View All link</p> 	<p>Clicking the View All link displays all rows of data on the page. When clicked, the link changes to view the original number of rows, allowing users to return to the original view.</p>

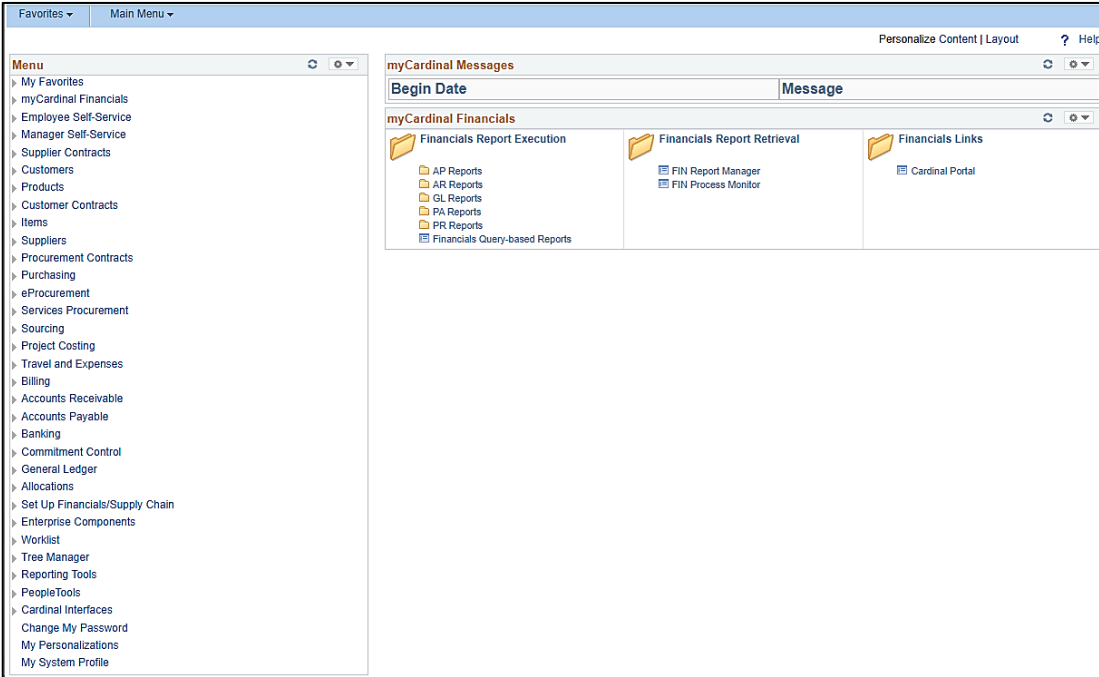


Feature	Description
<p>Show All Columns icon</p> 	<p>Click the Show All Columns icon to reveal all grid columns on a single tab.</p>
<p>Show Tabs icon</p> 	<p>Click the Show Tabs icon to return to the tabbed view of a grid.</p>
<p>Zoom icon</p> 	<p>Click the Zoom icon to expand the section, revealing more information. Click the Return button to return to the original view.</p> 
<p>Download Table to Excel icon</p> 	<p>Click the Download Tabe to Excel icon to download or export a file or report.</p>

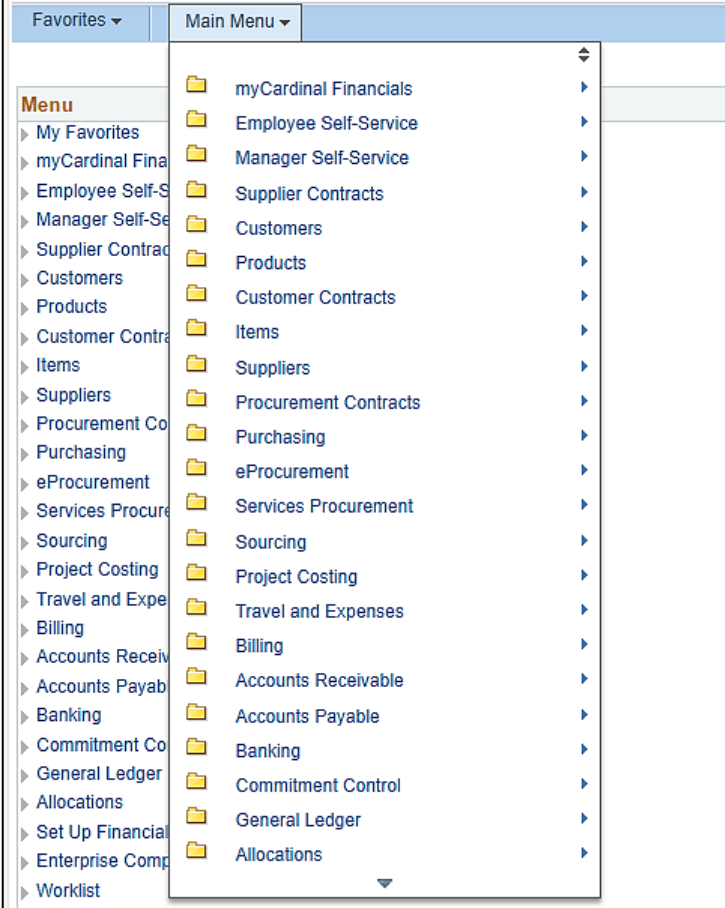
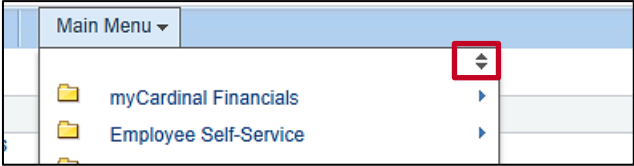

Navigating to Cardinal Financial Pages using the Menu

The Menu contains individual list items that are organized within a structured menu of similar Cardinal Financials (FIN) functional areas and pages. The specific menu items available are based the user's assigned responsibilities in Cardinal Financials.

Both the **Homepage Menu** and the **NavBar Main Menu** can be used to access all of the Cardinal Financials pages that the user has been granted access based upon assigned responsibilities. The **Homepage Menu** opens the items in a folder format. The **NavBar Main Menu** opens the items in a dropdown list and in a folder format. The **NavBar Main Menu** also allows users to sort the menu items in ascending or descending order.

Scenario: You are an Accounts Receivable Specialist. You need to navigate to the **Supplier Information Find an Existing Value** page prior to locating and updating information for a Supplier.

Step	Action
	<p>These navigation tips begin at the Cardinal Financials (FIN) Homepage.</p> 
1.	<p>Click the Main Menu link in the NavBar.</p> 
	<p>Both the Homepage Menu and the NavBar Main Menu can be used to access all of the Cardinal Financials pages that the user has been granted access to based upon their assigned responsibilities.</p>

Step	Action
	<p>The Main Menu displays.</p> 
2.	<p>Click the Sort icon to sort the menu list items in descending order.</p> 
	<p>The Sort icon can be used to sort the menu list items alphabetically in ascending or descending order.</p>

Step	Action
------	--------

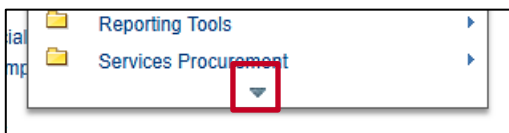
The **Main Menu** refreshes and the menu list items display in descending alphabetical order.



The specific menu list items available in the **NavBar Main Menu** are based on the user's assigned responsibilities in Cardinal Financials. For this scenario, the following steps would be used to navigate to the **Supplier Information Search** page.

3.

Click or hover over the **Down Arrow** icon (below list) to view the additional menu items.



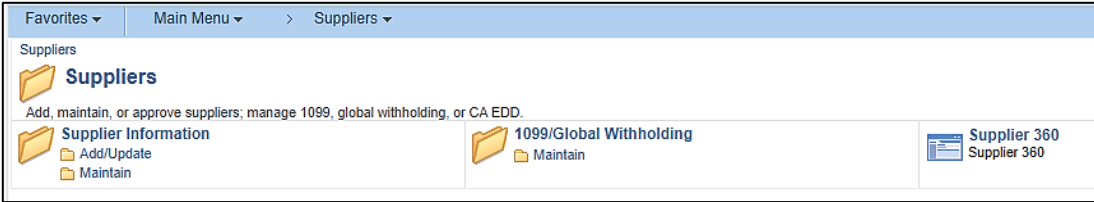
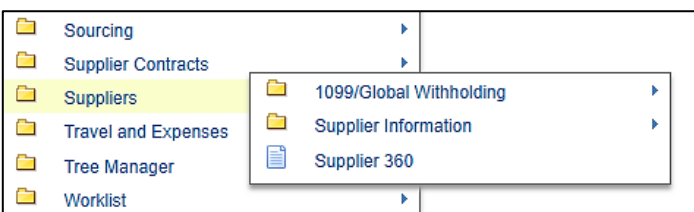
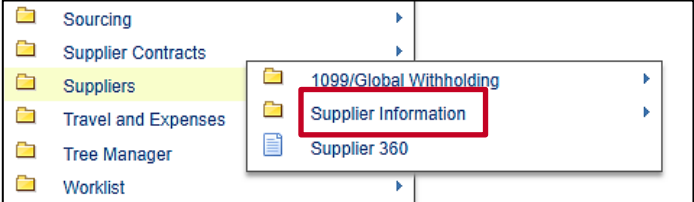
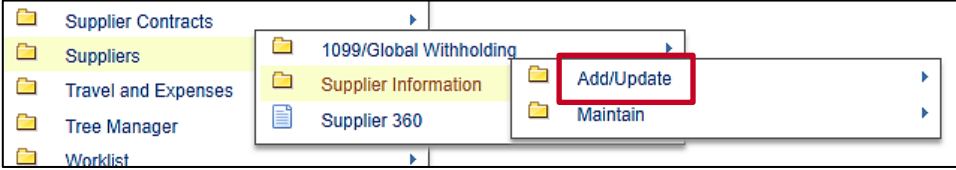
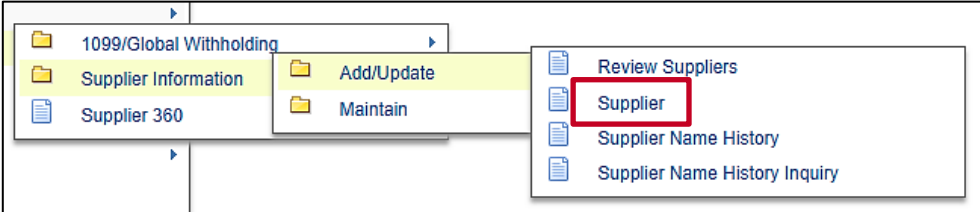
Step	Action
------	--------

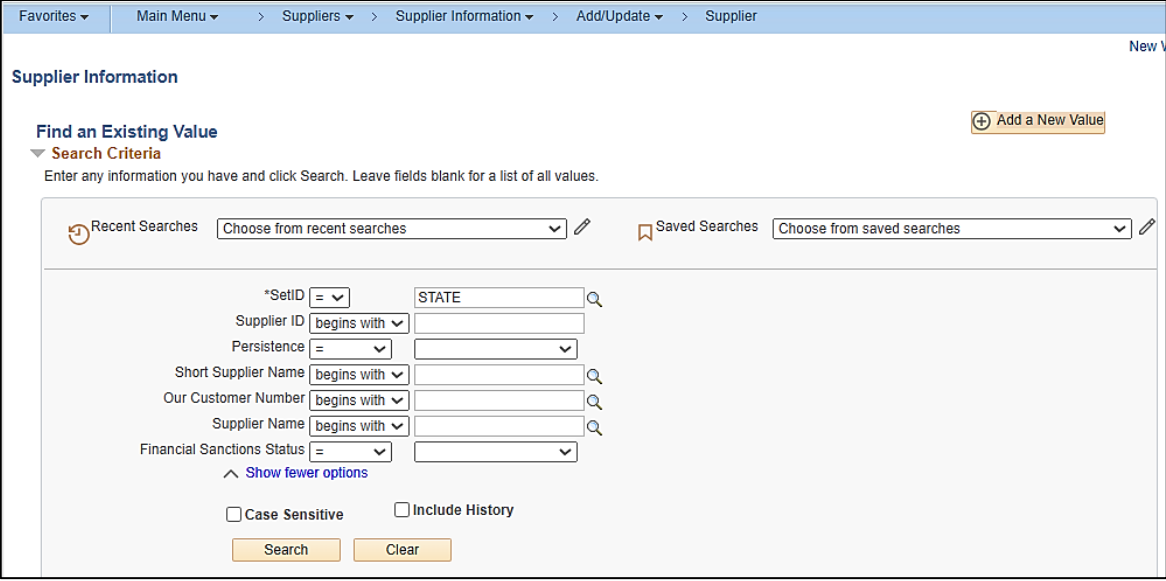

The remaining portion of the **Main Menu** displays.



4. Select the **Suppliers** menu item by clicking the **Folder** icon, the **Suppliers** link, or the **Expand** icon.



Step	Action
	<p>Clicking the Folder icon displays the menu items in a folder format in the same manner as when using the Homepage Menu.</p>  <p>i Clicking either the Suppliers link or the Expand icon displays the results in a dropdown menu format.</p>  <p>Either navigation path provides the same results. Continuing with the example, the Suppliers link is selected to navigate to the Supplier Information Find an Existing Value page.</p>
5.	<p>Click the Supplier Information link.</p> 
6.	<p>Click the Add/Update link.</p> 
7.	<p>Click the Supplier link.</p> 

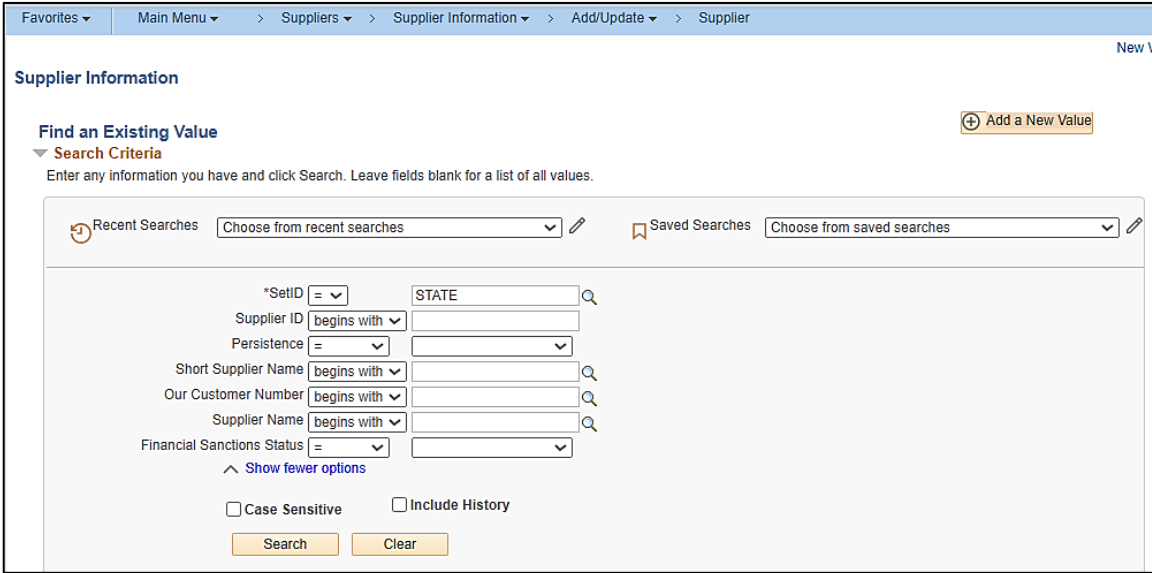


Step	Action
	<p>The Supplier Information Find an Existing Value Search page displays.</p> 
	<p>From the Supplier Information Search page, the user in this scenario can locate and update information for the applicable Supplier.</p>



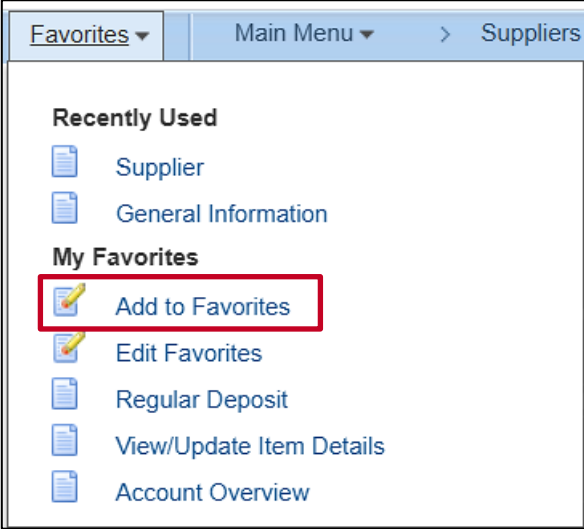
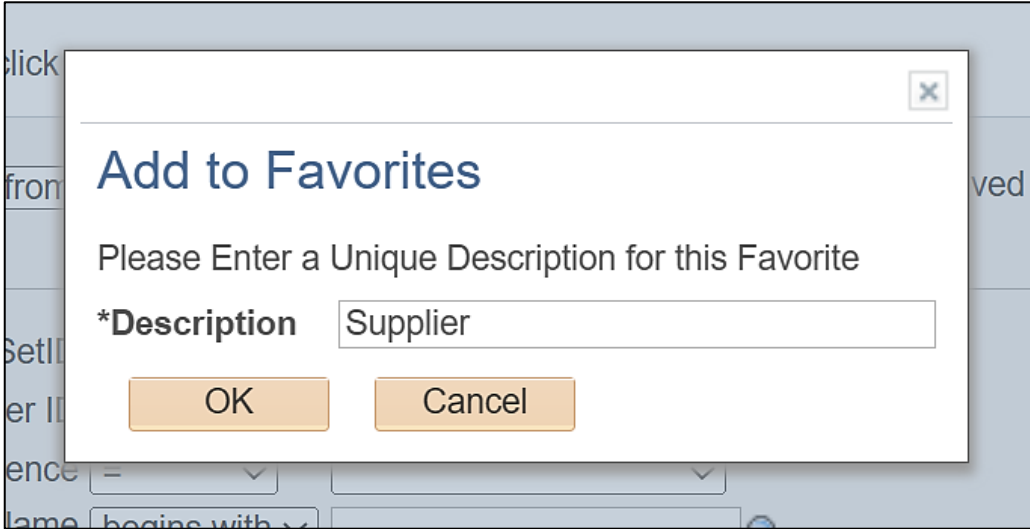

Adding a Favorite


The Favorites feature allows users to define specific Cardinal Financials pages as Favorites which allows quick access to frequently used pages.

The **My Favorites** menu can be accessed from the **Menu** or from the **Favorites** link in the **NavBar** on the Cardinal Financials Homepage. Pages may be added to the **Favorites** menu by using the **Favorites** link in the **NavBar** or the **Add to Favorites** link at the top of the page.

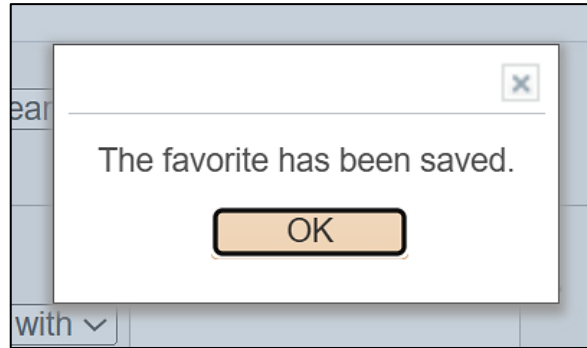
Scenario: You are an Accounts Receivable Specialist. You have navigated to the **Supplier Information Find an Existing Value Search** page and now want to add this page to your Favorites for easy access.

Step	Action
	<p>This process begins at the Supplier Information Find an Existing Value Search page.</p> 
	<p>For further information pertaining to the Cardinal Financials Search pages, see the Job Aid titled Overview of the Cardinal FIN Search Pages. This Job Aid is available on the Cardinal Website in Job Aids under Learning.</p>
<p>1.</p>	<p>Click the Add to Favorites link at the top of the page.</p> 

Step	Action
	<p>Users may also select the Favorites link in the NavBar to add a page to their Favorites with one additional step.</p> <p>Click the Favorites link in the NavBar.</p>  <p>Click the Add to Favorites list item.</p> 
	<p>The Add to Favorites page displays in a pop-up window.</p> 
	<p>Users can apply the Description field as it is labeled or change it to a custom description.</p>

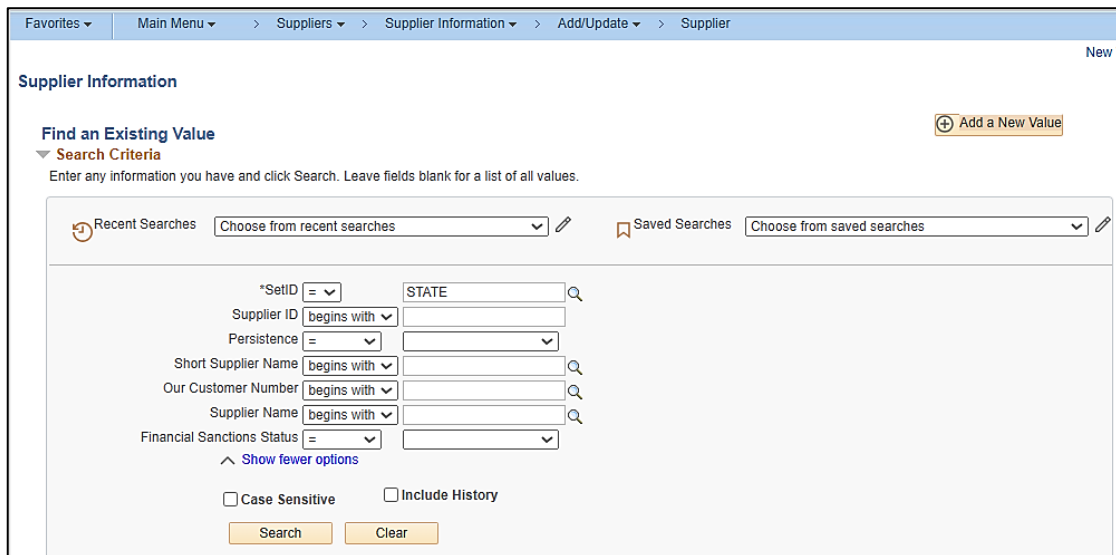
Step	Action
2.	Click the OK button to save the page to Favorites. 

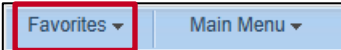
A **Confirmation** message displays in a pop-up window.

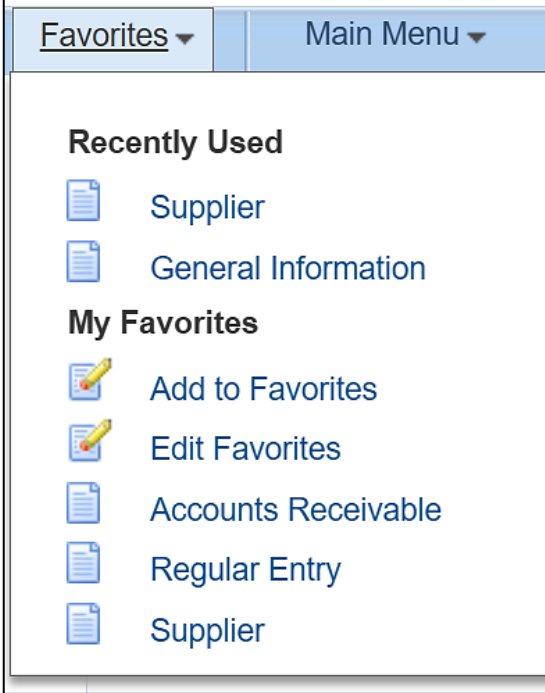
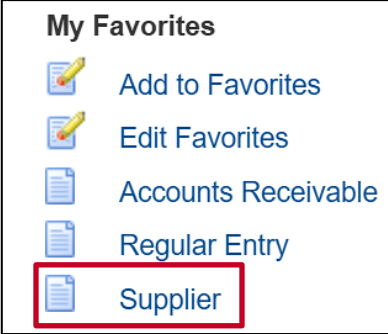



3.	Click the OK button. 
----	---

The **Supplier Information Find an Existing Value Search** page redispays.



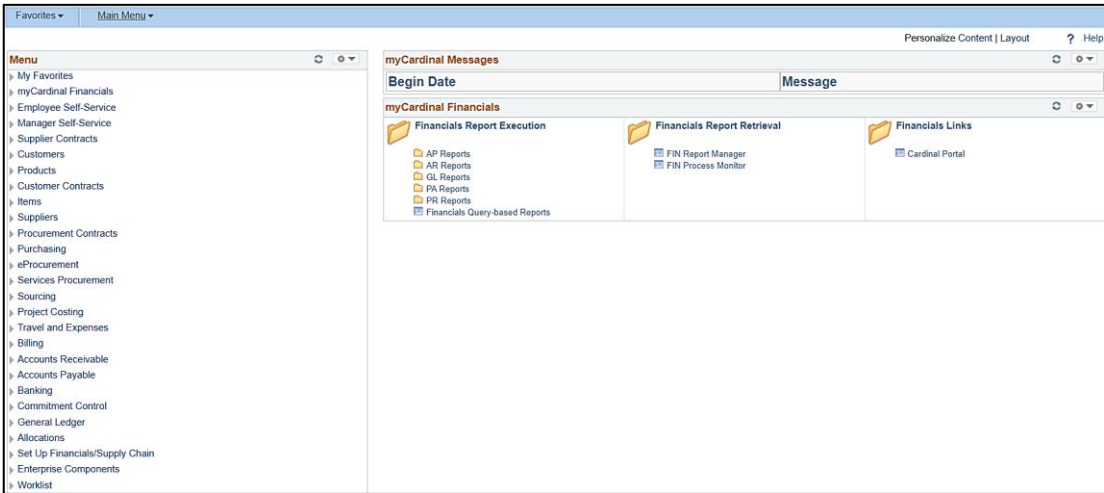


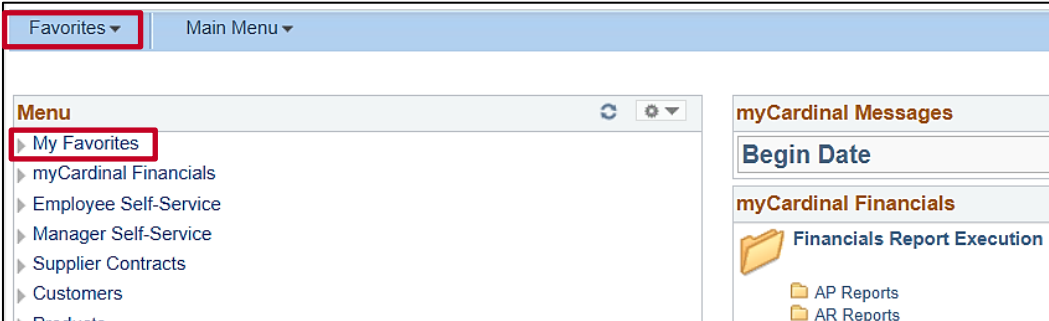
4.	Click the Favorites link to verify that the page has been added. 
----	--

Step	Action
	<p>The Favorites menu displays.</p> 
5.	<p>Verify that the page now displays in the Favorites menu.</p> 
	<p>Once added as a Favorite, Cardinal Financials pages can be quickly accessed by simply opening the Favorites menu and clicking the corresponding menu list item.</p>

Managing and Deleting Favorites

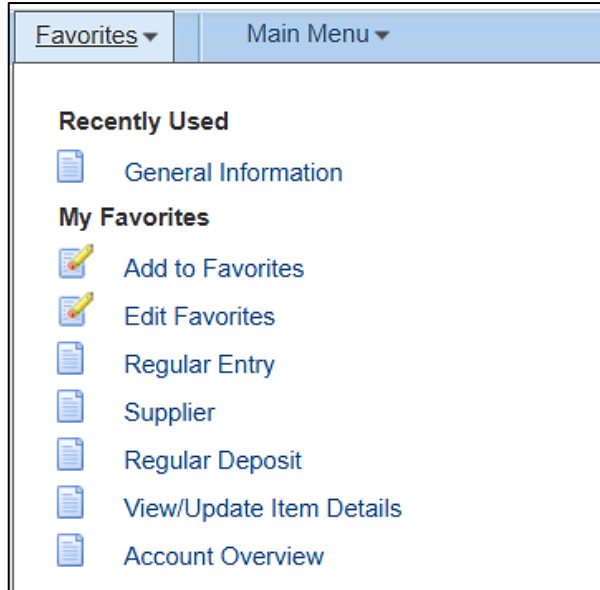
The **Favorites** menu can be accessed from the **NavBar** or **Menu** on the Cardinal Financials Homepage. Once added, Favorites can be renamed, deleted, or re-ordered as needed.

Scenario: You are an Accounts Receivable Specialist. You have already added several pages to your Favorites. You now want to re-order them to display in a specific order.

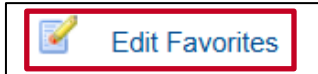
Step	Action
	<p>This process begins at the Cardinal Financials Homepage.</p> 
1.	<p>Click the Favorites link in the NavBar.</p> 
	<p>My Favorites can be accessed using the Favorites link in the NavBar or using the link in the Menu on the Homepage.</p> 

Step	Action
------	--------

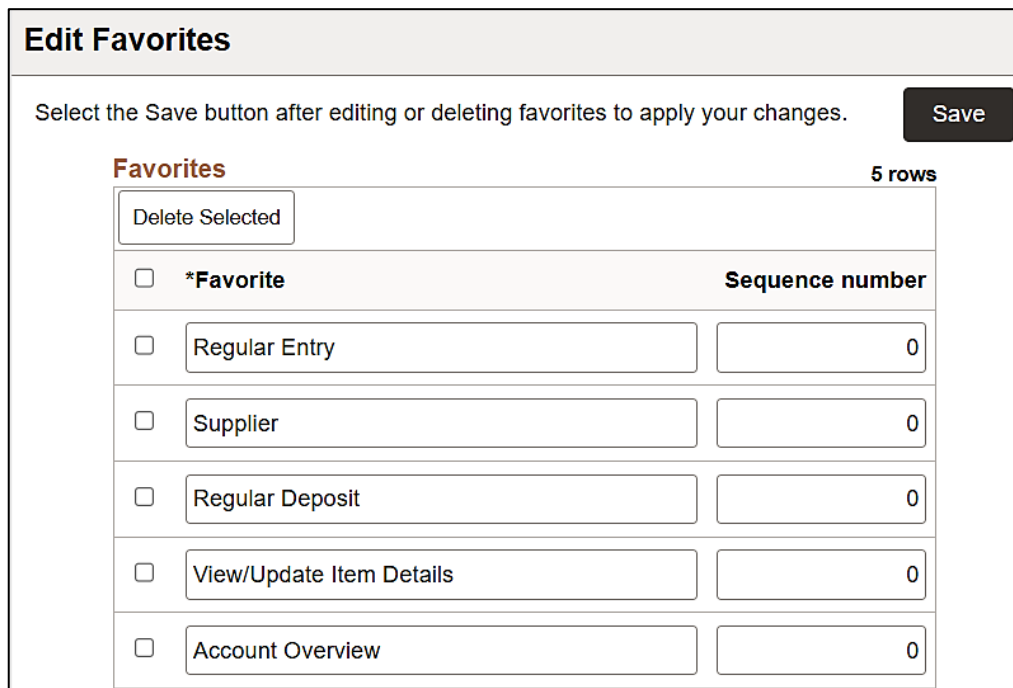
The **Favorites** menu displays.




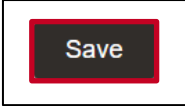
2. Click the **Edit Favorites** link.



The **Edit Favorites** page displays.

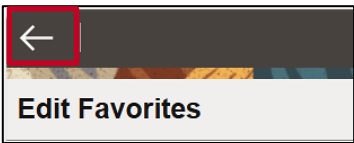


Step	Action																		
	<p>To rename a favorite, click in the corresponding text box and type in the updated name. To delete a Favorite, click the corresponding Select checkbox option and then click the Delete Selected button.</p> <div data-bbox="292 462 1263 808" style="border: 1px solid black; padding: 5px;"> <p>Favorites 5 rows</p> <p>Delete Selected</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;"><input type="checkbox"/></th> <th style="width: 85%;">*Favorite</th> <th style="width: 10%;">Sequence number</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Regular Entry</td> <td>0</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Supplier</td> <td>0</td> </tr> </tbody> </table> </div>	<input type="checkbox"/>	*Favorite	Sequence number	<input checked="" type="checkbox"/>	Regular Entry	0	<input type="checkbox"/>	Supplier	0									
<input type="checkbox"/>	*Favorite	Sequence number																	
<input checked="" type="checkbox"/>	Regular Entry	0																	
<input type="checkbox"/>	Supplier	0																	
3.	<p>To re-order the Favorites, enter sequential numbers as desired in each of the Sequence number fields (e.g., if a “1” is entered in the Sequence number field, that page will display first in the list and so on).</p> <div data-bbox="300 955 516 1234" style="border: 1px solid black; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 85%;">Sequence number</th> </tr> </thead> <tbody> <tr><td style="text-align: right;">0</td></tr> <tr><td style="text-align: right;">0</td></tr> <tr><td style="text-align: right;">0</td></tr> </tbody> </table> </div>	Sequence number	0	0	0														
Sequence number																			
0																			
0																			
0																			
<p>Sample Edit Favorites page with Sequence numbers entered.</p> <div data-bbox="376 1318 1258 1900" style="border: 1px solid black; padding: 5px;"> <p>Favorites 5 rows</p> <p>Delete Selected</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;"><input type="checkbox"/></th> <th style="width: 85%;">*Favorite</th> <th style="width: 10%;">Sequence number</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Regular Entry</td> <td style="text-align: right;">1</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Supplier</td> <td style="text-align: right;">3</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Regular Deposit</td> <td style="text-align: right;">5</td> </tr> <tr> <td><input type="checkbox"/></td> <td>View/Update Item Details</td> <td style="text-align: right;">4</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Account Overview</td> <td style="text-align: right;">2</td> </tr> </tbody> </table> </div>		<input type="checkbox"/>	*Favorite	Sequence number	<input type="checkbox"/>	Regular Entry	1	<input type="checkbox"/>	Supplier	3	<input type="checkbox"/>	Regular Deposit	5	<input type="checkbox"/>	View/Update Item Details	4	<input type="checkbox"/>	Account Overview	2
<input type="checkbox"/>	*Favorite	Sequence number																	
<input type="checkbox"/>	Regular Entry	1																	
<input type="checkbox"/>	Supplier	3																	
<input type="checkbox"/>	Regular Deposit	5																	
<input type="checkbox"/>	View/Update Item Details	4																	
<input type="checkbox"/>	Account Overview	2																	

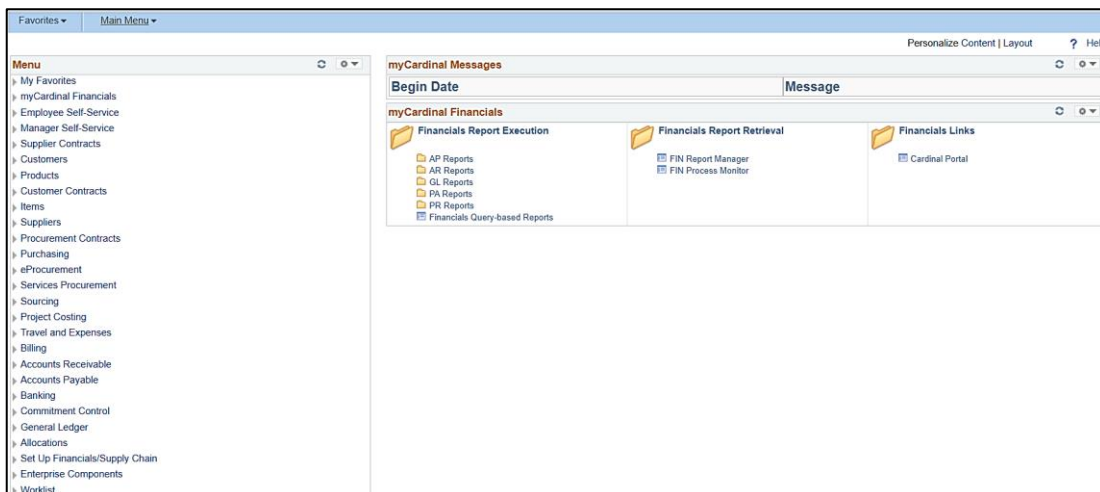
Step	Action
4.	Click the Save button. 

The **Edit Favorites** page refreshes with the list items displayed in the defined sequence.

Favorites		5 rows
Delete Selected		
<input type="checkbox"/>	*Favorite	Sequence number
<input type="checkbox"/>	Regular Entry	1
<input type="checkbox"/>	Account Overview	2
<input type="checkbox"/>	Supplier	3
<input type="checkbox"/>	View/Update Item Details	4
<input type="checkbox"/>	Regular Deposit	5


5.	Click the Home icon on the Edit Favorites page. 
----	--

The **Cardinal Financials Homepage** redispays.

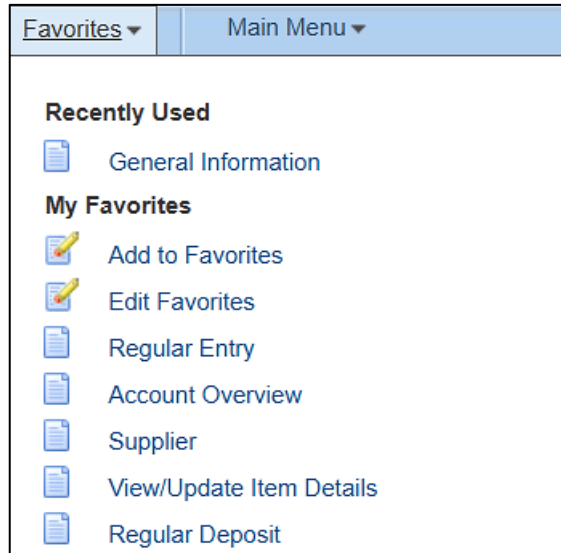


The screenshot shows the Cardinal Financials homepage with the following sections:

- Menu:** A list of navigation options including My Favorites, myCardinal Financials, Employee Self-Service, Manager Self-Service, Supplier Contracts, Customers, Products, Customer Contracts, Items, Suppliers, Procurement Contracts, Purchasing, eProcurement, Sourcing, Project Costing, Travel and Expenses, Billing, Accounts Receivable, Accounts Payable, Banking, Commitment Control, General Ledger, Allocations, Set Up Financials/Supply Chain, Enterprise Components, and Worklist.
- myCardinal Messages:** A section for messages with a 'Begin Date' and 'Message' column.
- myCardinal Financials:** A section containing:
 - Financials Report Execution:** Includes AP Reports, AR Reports, GL Reports, PA Reports, PR Reports, and Financials Query-based Reports.
 - Financials Report Retrieval:** Includes FIN Report Manager and FIN Process Monitor.
 - Financials Links:** Includes Cardinal Portal.

Step	Action
6.	Verify that the edits have been applied. Click the Favorites link in the NavBar . 

The **Favorites** menu displays the list items in the newly defined sequence.



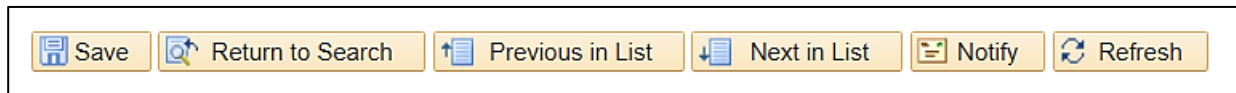
The screenshot shows the 'Favorites' menu dropdown. At the top are two tabs: 'Favorites' (selected) and 'Main Menu'. Below the tabs, the menu is organized into two sections:

- Recently Used**
 - General Information
- My Favorites**
 - Add to Favorites
 - Edit Favorites
 - Regular Entry
 - Account Overview
 - Supplier
 - View/Update Item Details
 - Regular Deposit

Common Buttons Overview

When completing Cardinal Financials pages that require data entry, the below row of buttons display at the bottom of the page. These buttons are used to perform the available actions.

This is not a comprehensive list of every button in Cardinal Financials. These are just some of the most commonly encountered buttons.



- **Save:** Saves the information or field values updated
- **Return to Search:** Returns the user to the corresponding **Find an Existing Value** page
- **Previous in List:** If a search was conducted that resulted in multiple search results, this button can be used to quickly navigate to the previous record in the search results list
- **Next in List:** If a search was conducted that resulted in multiple search results, this button can be used to quickly navigate to the next record in the search results list
- **Notify:** This functionality is currently not utilized in Cardinal Financials
- **Refresh:** Click this button to refresh the page. This refresh will often update data in certain fields based on data values that have already been entered in related fields

Hot Key (Keyboard Shortcuts)

Hot Key	Description
ALT+1	<ul style="list-style-type: none"> Saves a page in a transaction Moves to the Search or Add button on a search or lookup page Moves to the OK button on a secondary page
ALT+2 <F5>	<ul style="list-style-type: none"> Returns to the Search page from the transaction page
ALT+5	<ul style="list-style-type: none"> Opens the Look Up page Opens the calendar prompt when the cursor is in a date field
ALT+7	<ul style="list-style-type: none"> Inserts a row in a grid or scroll area when the cursor is in the grid
ALT+8	<ul style="list-style-type: none"> Deletes a row in a grid or scroll area when the cursor is in the grid
ALT+0	<ul style="list-style-type: none"> Allows the user to refresh the page
ALT+/ ALT+\	<ul style="list-style-type: none"> Finds data in a grid or scroll area Toggles between the Add a New Value and Find an Existing Value tabs when the cursor is on a Search page
CTRL+J or ALT+SHIFT+J	<ul style="list-style-type: none"> Displays the System Information page
ENTER	<ul style="list-style-type: none"> Activates the OK button, where appropriate. On a Search page, activates the Search button. On a lookup page, activates the Look Up button